How do I create a Requisition?

BERKELEY LAB

These panels provide users with an introduction into the PeopleSoft eProcurement 8 system. Requisitions will be entered and linked via processes into Purchase Orders.

Login

1. Assemble all the documentation for the requisition.
2. 1. Login to the PeopleSoft ver. 8 eProcurement system and prepare to create a requisition

Navigation

3. Follow the 2. Navigation into ePro8.

Create a Requisition

4. Select Create 3. Requisitions from the panel selections available.
5. Within the Create Requisitions, you will be able to create requisitions by browsing or searching company and external catalogs & cancel requisitions.
6. You will need to select the Business Unit "LBNL", and as the "Preparer" you will have to enter the 4. Requester's name.

7. Add the 5. Defaults to the requisition, enter the 6. Requisition Type, and if Applicable, enter the Requisition Title

Requisition Line Information

8. Add the 7. details for each item being requested for purchase.
9. If you have more than one item on the requisition, click the "Special Request" button.
10. Restricted Items must conform to the 8. LBNL policies.
11. Once complete you can either 9. Save for Later or Save and Submit.

Sole Source, Comments and Attachments

12. Should you need to create a 10. Sole Source requisition.
13. Click on the Comments icon to add 11. Attachments.
13. After you've uploaded your file you are complete.

Adding Multiple Distributions

15. Added 12. multiple distribution lines will be used for Project ID's, Cost Distributions, and Ship To info.

How do I create a Requisition?

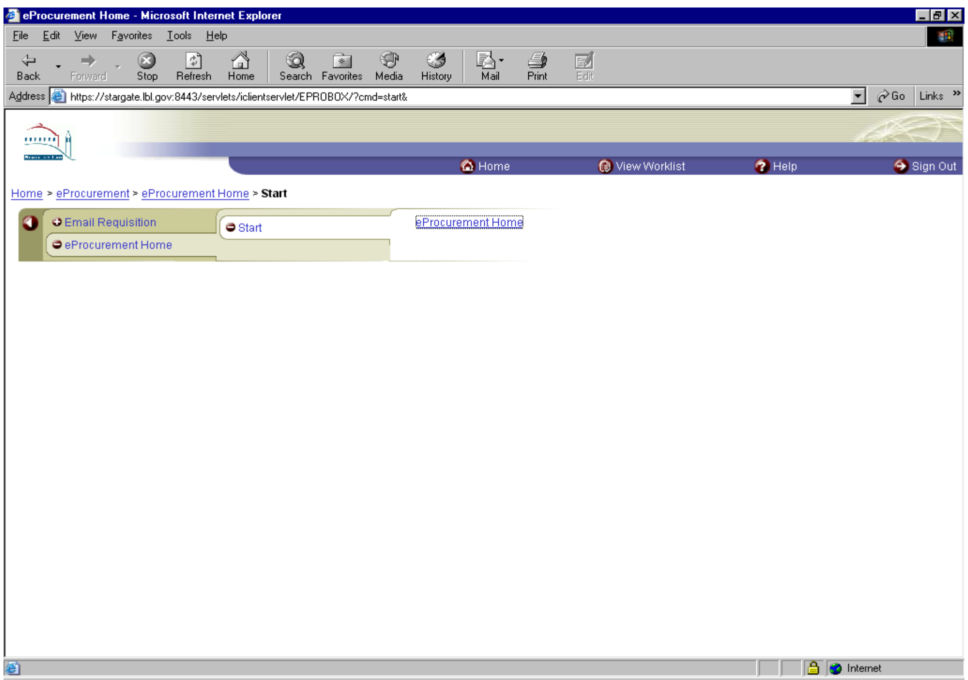
Step 1: Login

- ❖ Launch Internet Explorer (IE)
  - o Log into eProcurement 8 via the link of **epro/EPROTRN**
  - o *Note: If your workstation is not set up with Internet Explorer contact the Help Desk (4357).*
- ➢ Enter the login name as directed by instructor (UPPERCASE only)
- ➢ Password is the same as Login (UPPERCASE only)

How do I create a Requisition?

Step 2: Navigation

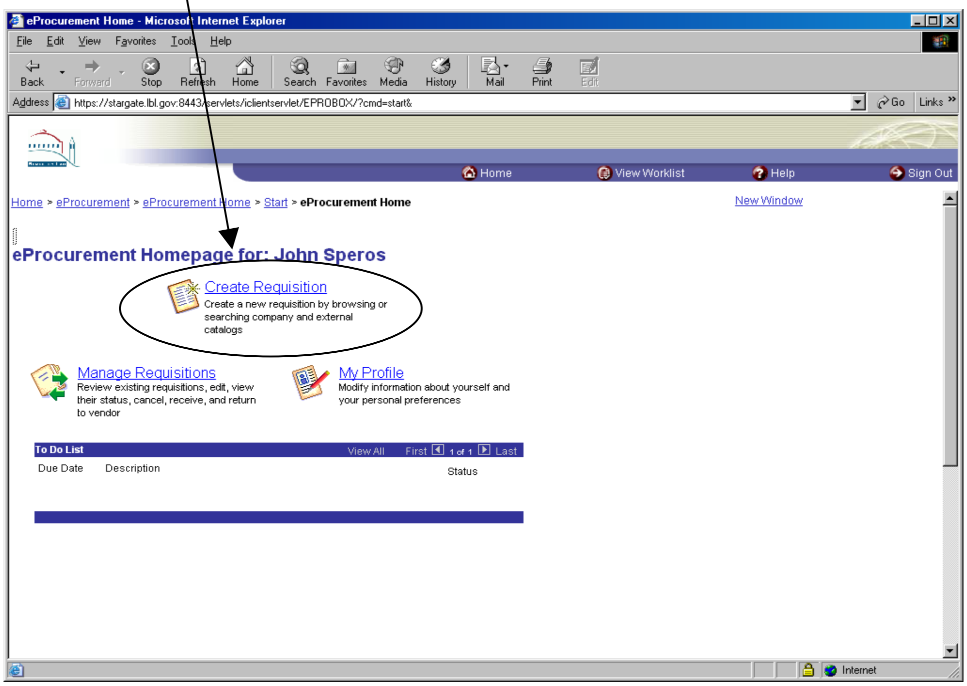
- ⇨ eProcurement
- ⇨ eProcurement Home
- ⇨ Start
- ⇨ eProcurement Home



How do I create a Requisition?

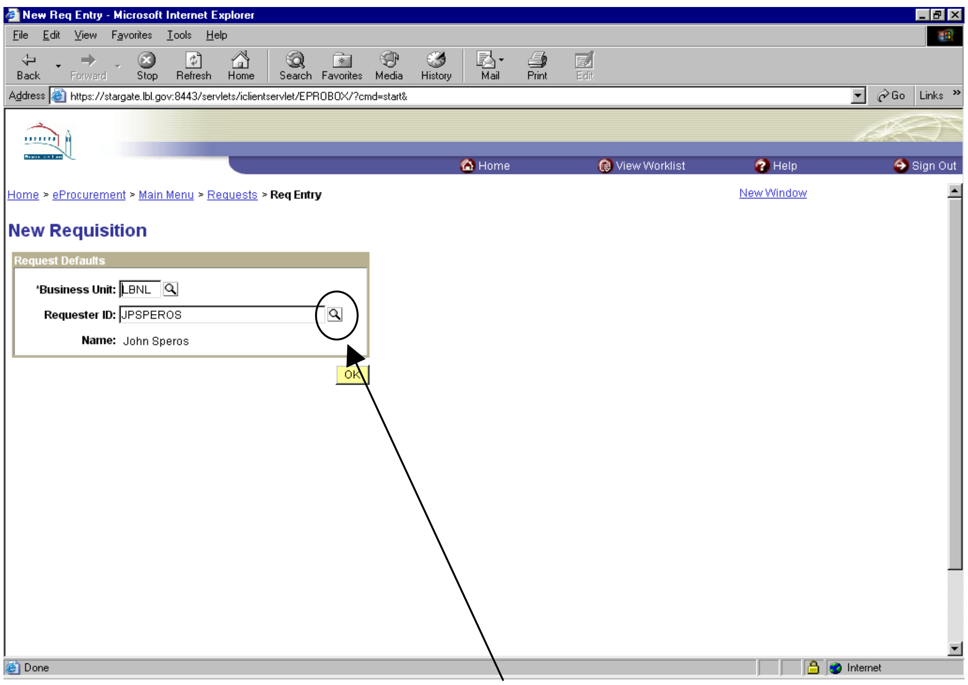
Step 3: Select Function

⇨ Create Requisition



Step 4: Enter the Requester

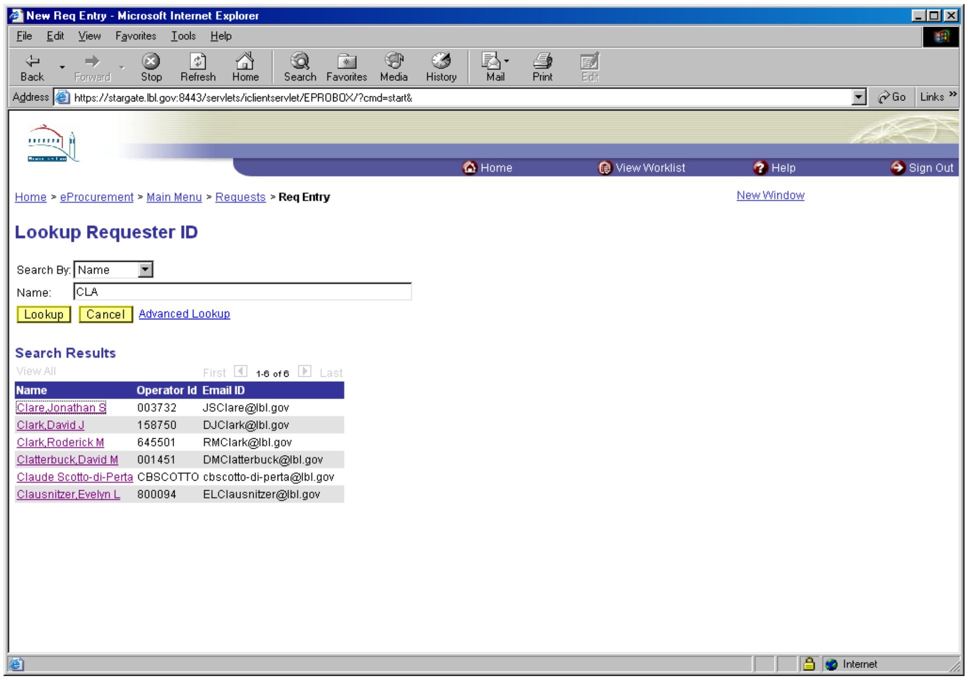
- If **LBNL** is not defaulted in as the Business Unit then enter **LBNL**.
- Verify that the **Requester ID** is correct (from your operator defaults)
- Click on the **OK** button



- Utilize the " Requester Lookup ID" icon to find the specific requester's name.

The Lookup Requester ID panel will be displayed.

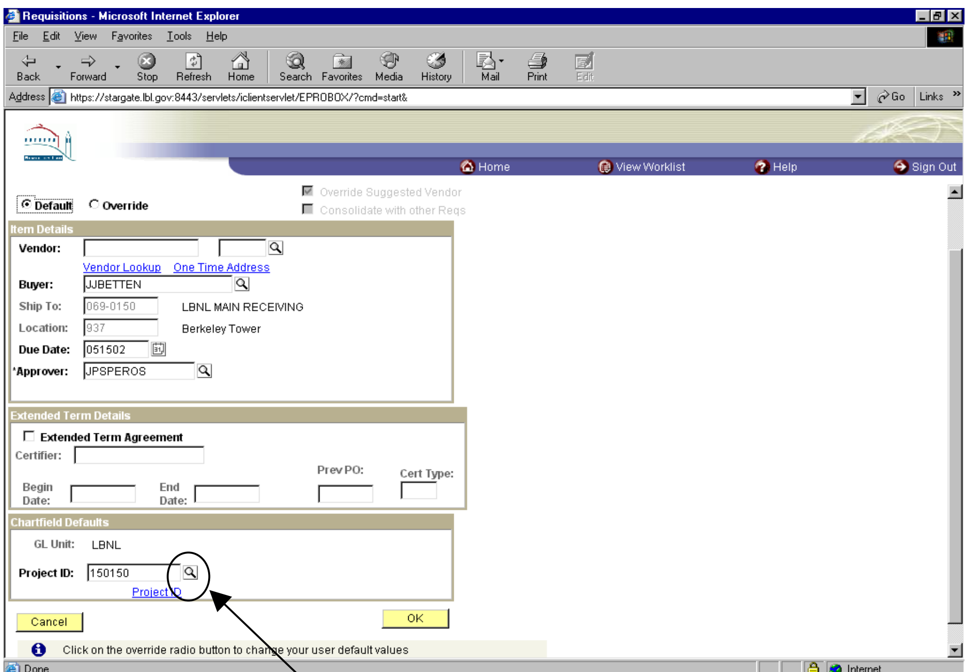
How do I create a Requisition?

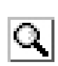


- In the “Search ID” field, change the value to “Name”.
- Key in lookup value and click the “Lookup” button. All values beginning with your search value will be returned.
- Select the name by clicking on the link and the value will be forwarded to “New Requisition” panel.

Step 5: Enter the Requisition Defaults

- Select a **Vendor Name's** or leave blank and have the buyer select one.
  - If a Vendor's name is not on the list, add the Vendor's name, Phone Number, and contact in the Comments section for the buyer.
- Verify that the **Buyer Name** is correct (from your operator defaults)
- Verify that the **Ship To Address & Location** is correct (from the Requester defaults). The default will be applicable to all requisition lines.
- Enter the **Expected Due Date**
- Enter the **Approver Name**



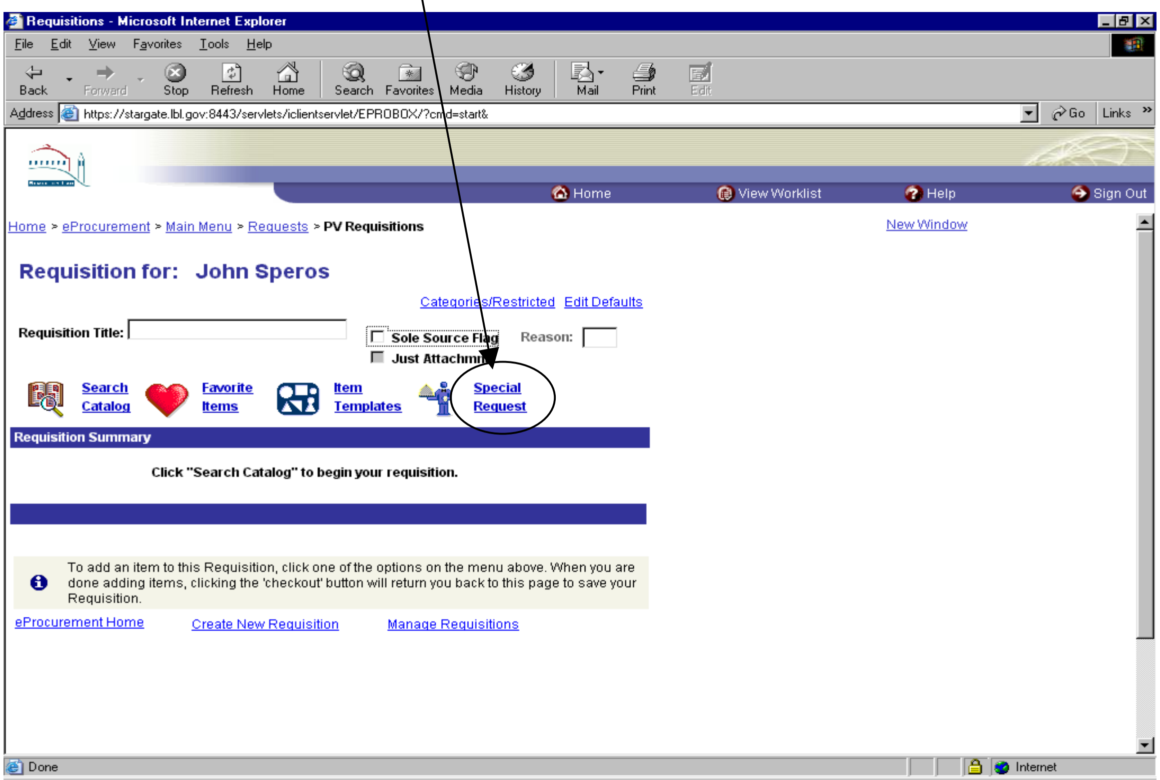
- If this requisition is and **Extended Term Agreement** activate the check box.
  - Select a Certifier
  - Create a Begin/End Date
  - Any previous PO for this service
  - Certifier Type
- Enter the **Project ID** or use the "Lookup Project ID"  icon.
- Click the **OK** button

Step 6: Enter the Requisition Type

- Enter a **Requisition Title** (if applicable)

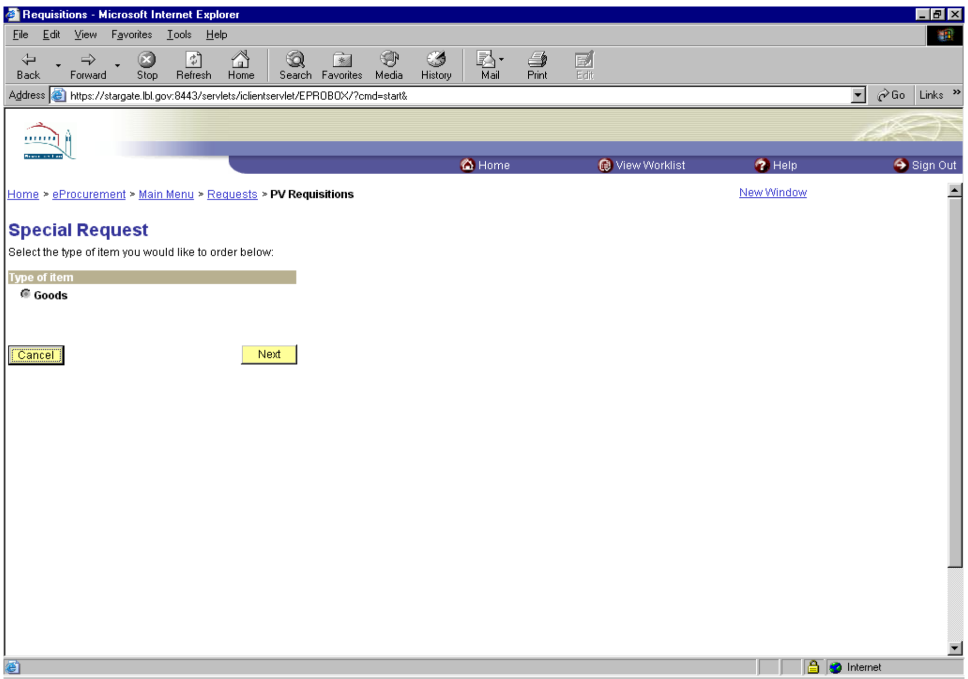
  Note: The information in this field will replace the assigned requisition number.

- Click on the **Special Request** Link.



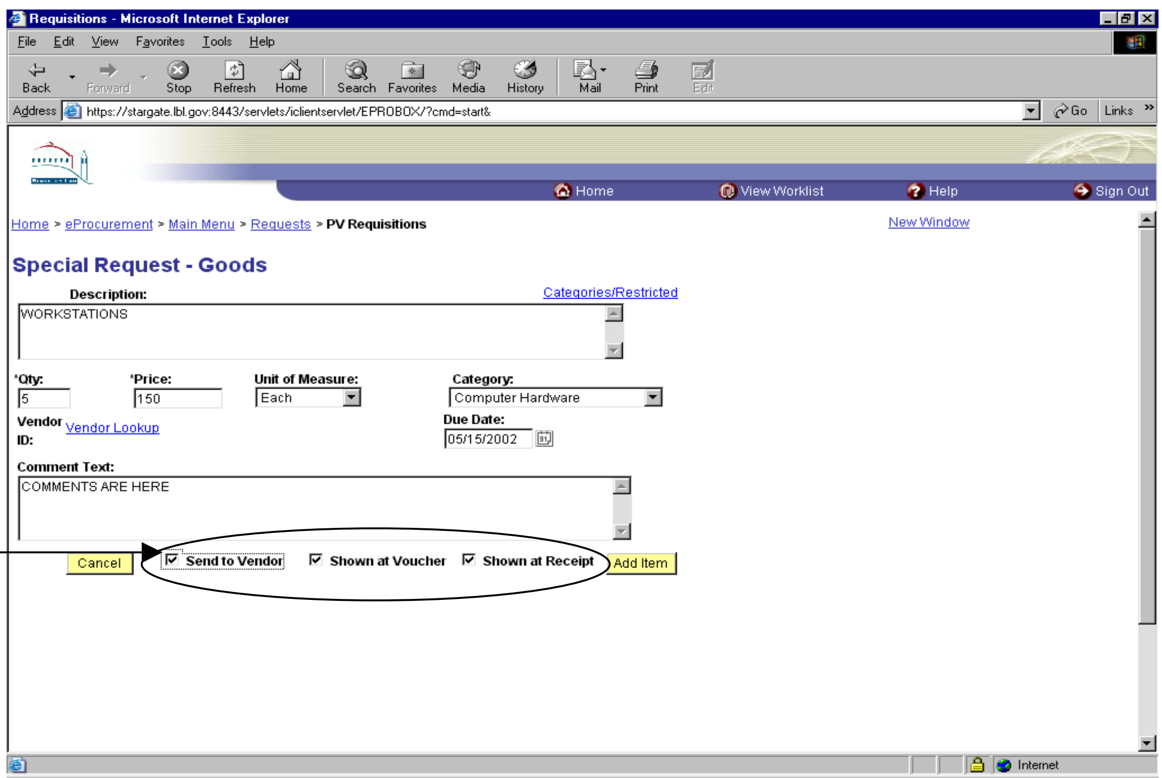
Enter the Special Request Type

➢ Click the **Next** button



Step 7: Enter the Requisition Details

- Enter a **Description of the Item or Service** being requested.
- Enter a **Quantity, Price**
- Select the **Unit of Measure and Category.**
- **Due Date** will default from the defaults panel.
- Enter any **Comments (if applicable) ,** within this area the user will include the suggested vendor previously mentioned.
- As the Preparer you can check who will be have access to the comments.
- Click on the **Add Item** button



NOTE: If the description contains in excess of 254 characters, the user can use the comments field to complete the description. If you use the field for this purpose, you will have to check all the boxes for viewing.

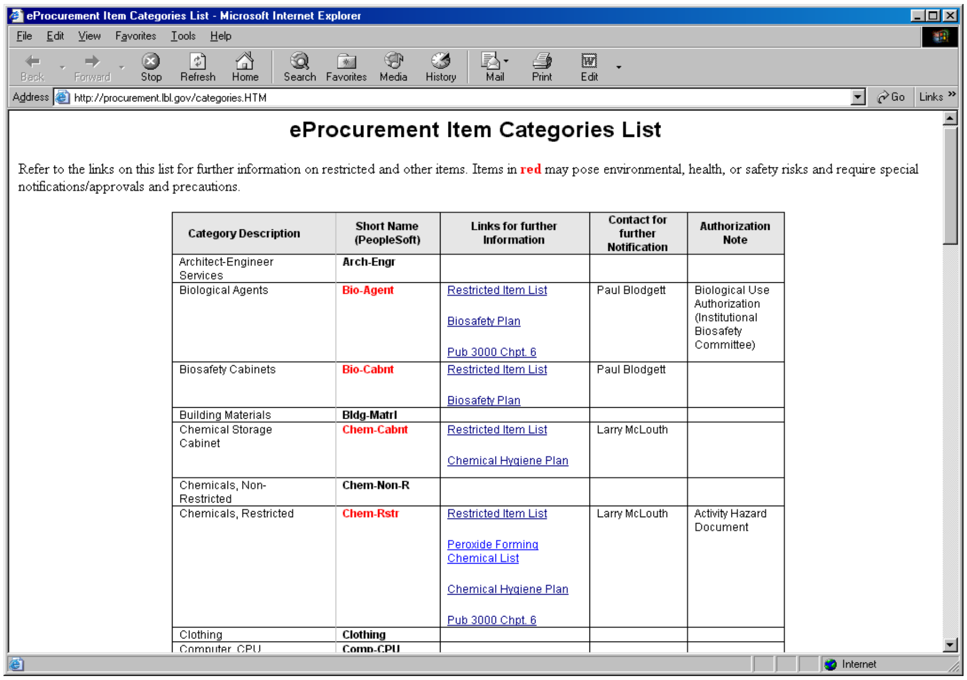
Step 8: Restricted Items Purchases

- All requisitions for restricted items have to follow the LBNL guidelines. By selecting a restricted item category from the list, the item will be routed to EH&S for approval or an email notification. A pop-up window will warn the user when the Item Category is a "Restricted" item.

- LBNL Maintains a Restricted Item list which can be view on the LBNL website.
- The chemicals and materials on the list are either dangerous to people or harmful to the environment and are regulated by Federal, DOE, State, or LBNL.
- These items are restricted but not prohibited from being purchased. The laboratory needs to ensure that the proper controls and authorizations are in place before the items are purchased. This is a Line Management responsibility.
- EH&S should be consulted before purchasing restricted items.
- Some substances/equipment require approval before purchase. The eProcurement Categories List indicates which ones require EH&S approval and which ones require EH&S notification.
- The requisition should contain all contact names and phone numbers to call in any case.
- When you submit a requisition for a Restricted Item, you are acknowledging the you have followed the rules regarding its purchase.

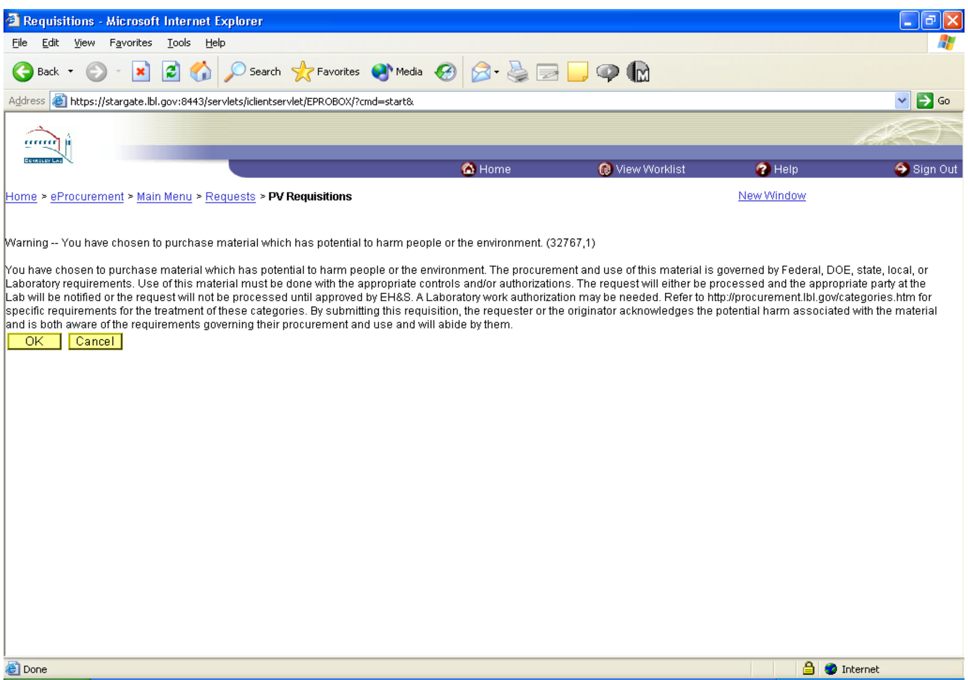
Within the ePro8 system a link is provided to allow the user Item Category definitions, within this database, Restricted item definitions along with contact names are given.

Within the ePro8 system a link is provided to allow the user Item Category definitions, within this database, Restricted item definitions along with contact names are given.



Category Description	Short Name (PeopleSoft)	Links for further Information	Contact for further Notification	Authorization Note
Architect-Engineer Services	Arch-Engr			
Biological Agents	Bio-Agent	Restricted Item List Biosafety Plan Pub 3000 Chpt 6	Paul Blodgett	Biological Use Authorization (Institutional Biosafety Committee)
Biosafety Cabinets	Bio-Cabnt	Restricted Item List Biosafety Plan	Paul Blodgett	
Building Materials	Bldg-Matrl			
Chemical Storage Cabinet	Chem-Cabnt	Restricted Item List Chemical Hygiene Plan	Larry McLouth	
Chemicals, Non-Restricted	Chem-Non-R			
Chemicals, Restricted	Chem-Rstr	Restricted Item List Peroxide Forming Chemical List Chemical Hygiene Plan Pub 3000 Chpt 6	Larry McLouth	Activity Hazard Document
Clothing	Clothing			
Computer, CPU	Comp-CPU			

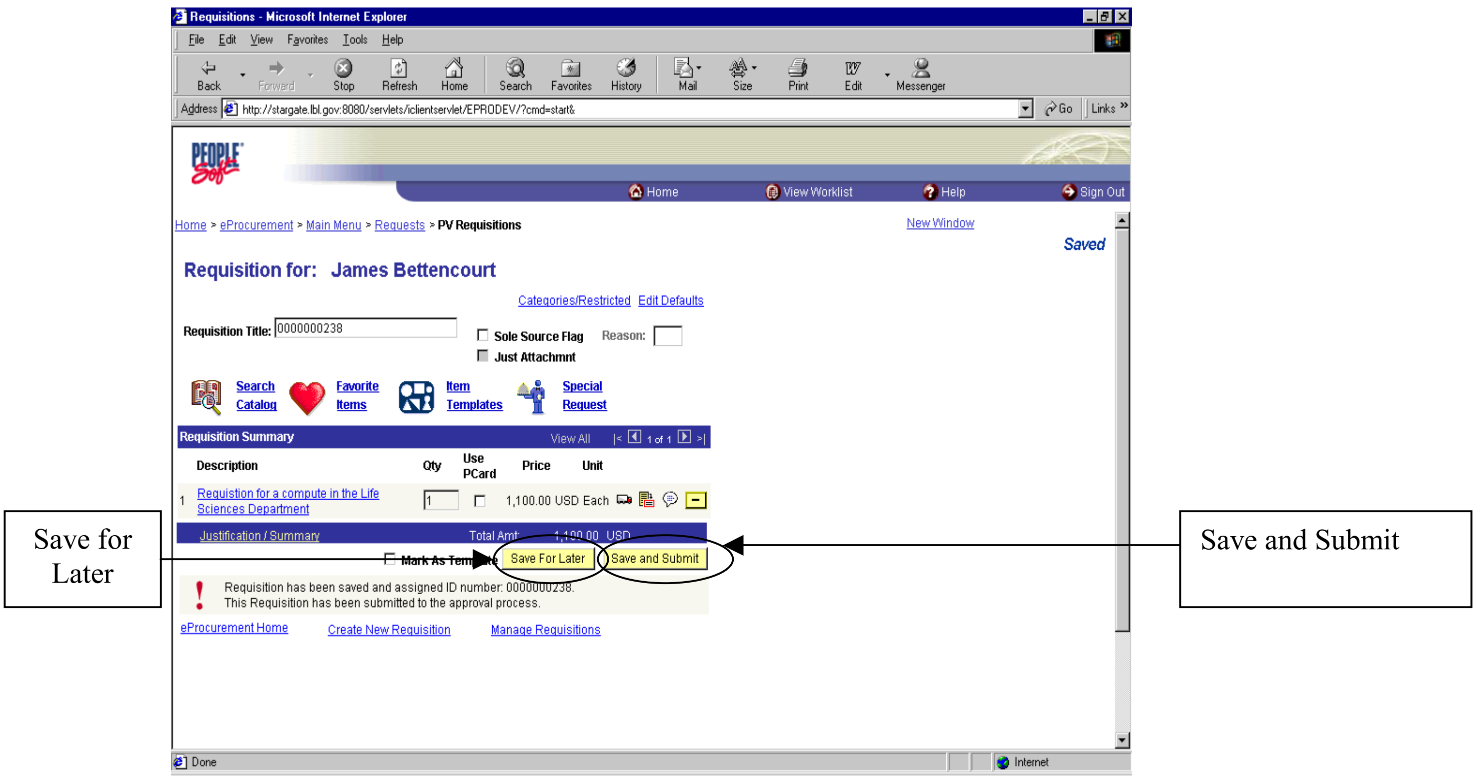
When the user saves the requisition, they will receive a warning pop-up panel showing that they've selected a restricted item.



The preparer must acknowledge the receipt of this warning by clicking on the OK button. Once accepted the requisition will be saved and a number will be assigned. When the requisition is submitted, EH&S will either be notified via email or be required to approve the request before the request is sent to purchasing.

Step 9: Save for Later or Submit Requisition

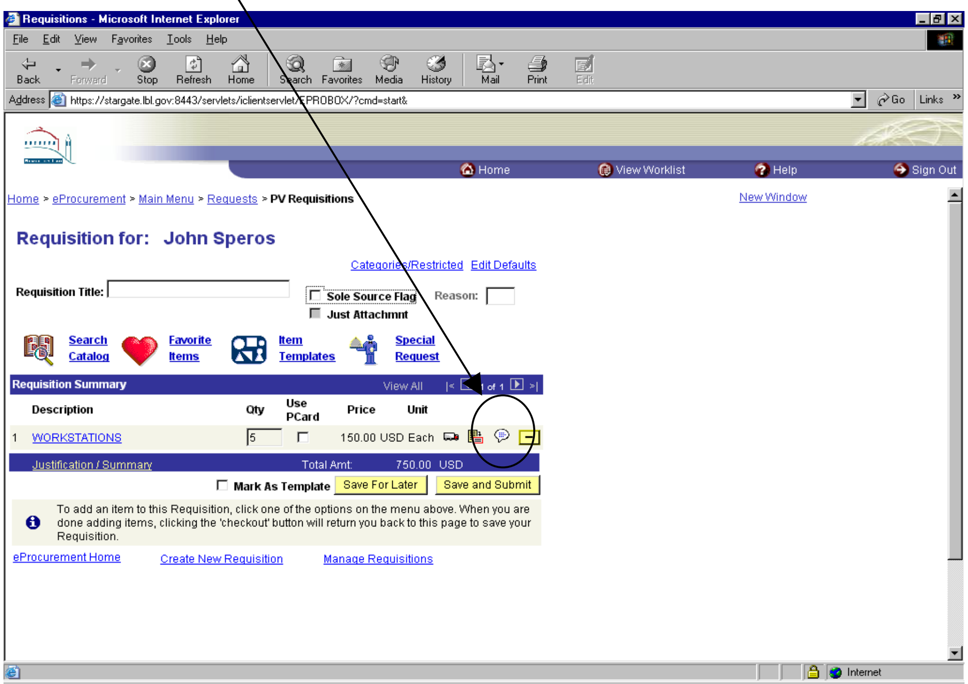
➢ Once you are complete with the requisitions and no other work needs to be added. You can either “Save and Submit” the requisition for approval and further processing or “Save for Later”. The Save for Later function allows you to save the requisition with a specific number to lookup and edit at a future time.



How do I create a Requisition?

Step 9: Summary Page

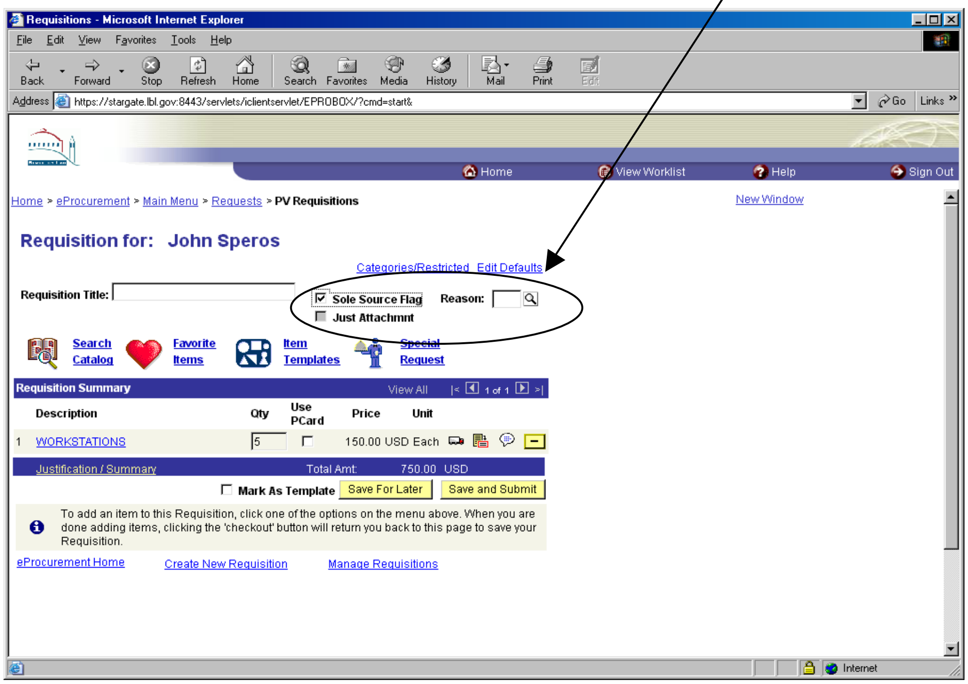
- Once you've reached this panel you have the option of clicking the "Save and Submit" button to complete the requisition. Should there be a requirement to add File Attachments you will need to click on the Comments icon.



	Use of this Icon will allow you to edit/update Ship To information. You will also be able to access the distribution panel.
	The distribution panel will allow you to create multiple distributions where you can change Project ID's or add lines for serialization.
	Adding "One-Time Addresses"
	Delete 1 Line
	Add 1 Line
	Line Detail Information for the requisition line items
	Comments Panel
Special Request	To add an item to this Requisition, click "Special Request" on the menu.
Save and Submit	When you are done adding items, click on the "Save and Submit" button to create a requisition.

Step 10: Sole Source Items

Whenever you have an item on your requisition that is a sole sourced item. You will check the "Sole Sourced" link, which will access the "Sole Source" menu. Selecting the "Sole Source Form" you can complete the "Berkeley Lab Justification for Sole Source or Intra-University Transaction" form save and attach it to the requisition using the electronic file attachment.



Using the tables, select the value that is applicable for this requisition:

Typical Requisitions	
< 25K	Nothing is Required
25K – 100K	Check Sole Source box and select a reason.
≥ 100K	Check Sole Source box and attach Justification Form

IUT (Intra-University Transactions – UC)	
< 25K	Nothing is Required
≥ 25K	Check Sole Source box and attach Justification Form

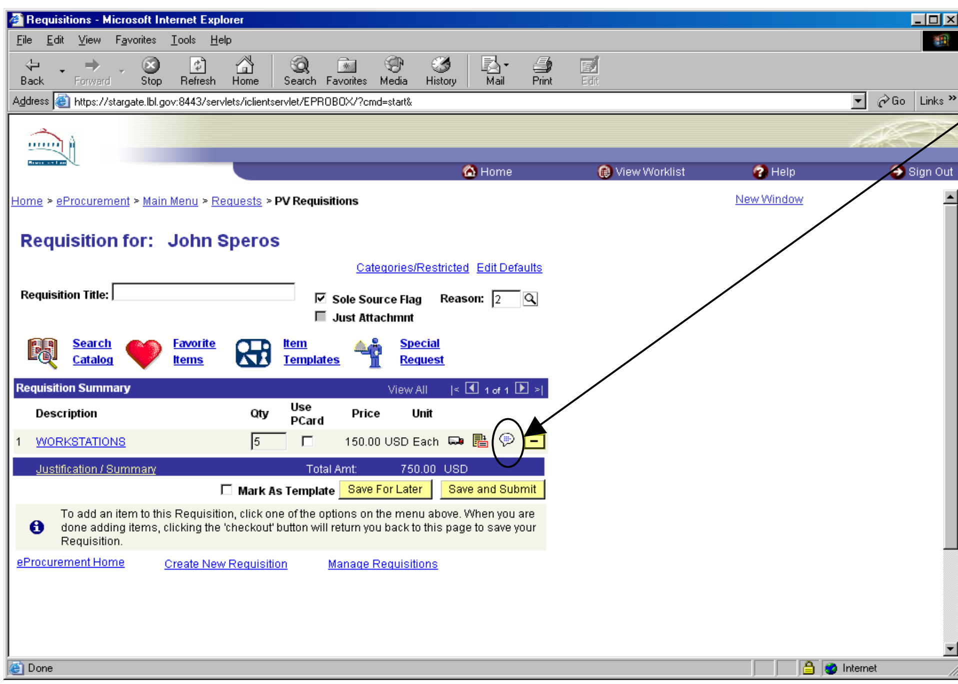
M&O (DOE Management & Operating Contractors)	
Any amount	Check Sole Source box and attach Justification Form

How do I create a Requisition?

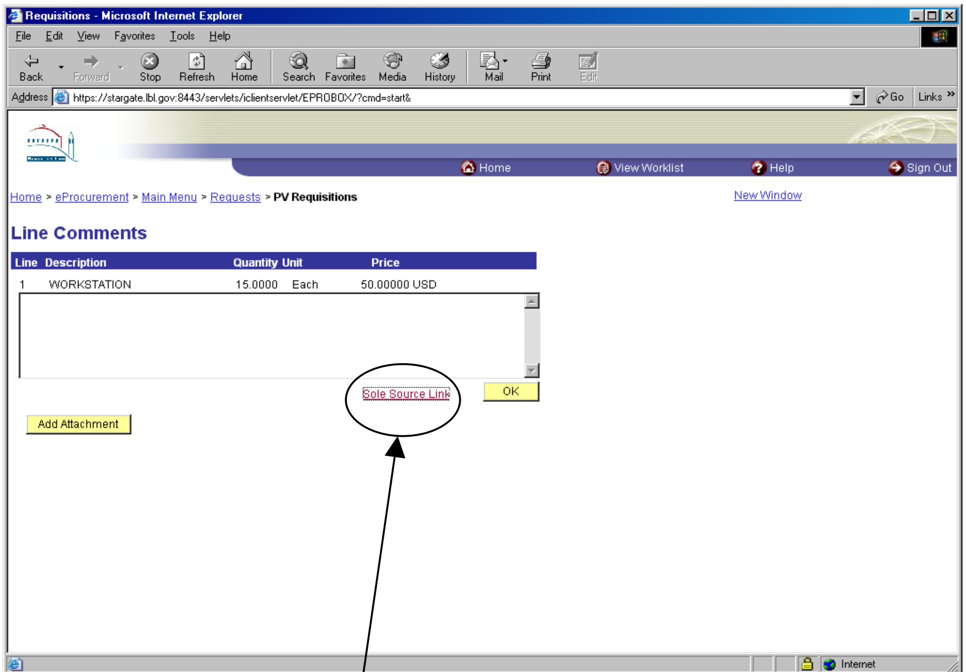
Select a reason from the Table.

1	Unique Capability
10	Other
2	Compatibility with equipment
3	Continued Develop or enhance
4	Unusual or compelling urgency
5	Industrial Mobilization
6	Authorized or req'd by statute
7	International Agreement
8	Leader in Field
9	National Security

Should you require adding the "Justification Form" click on the comments icon to access the panel?

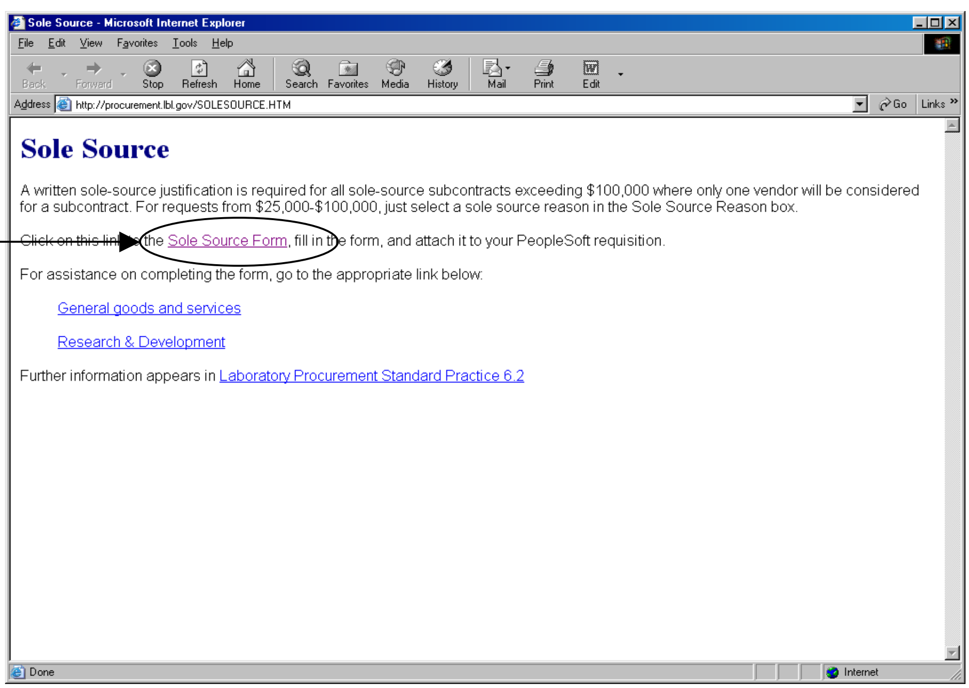


How do I create a Requisition?



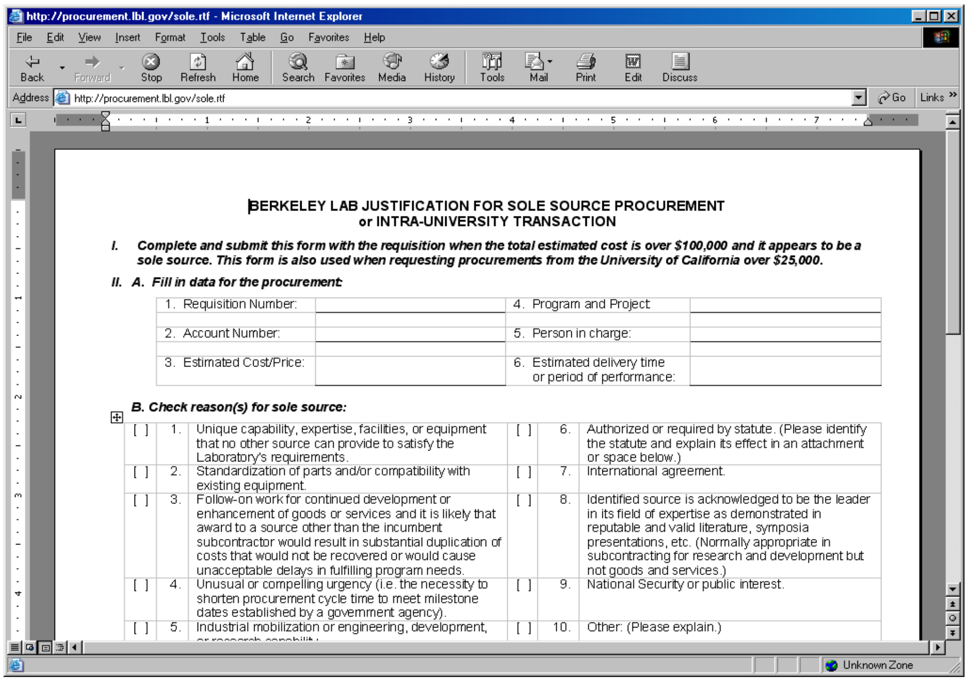
Select the Sole Source link.

Click on the Sole Source Link and complete the "Justification Form".

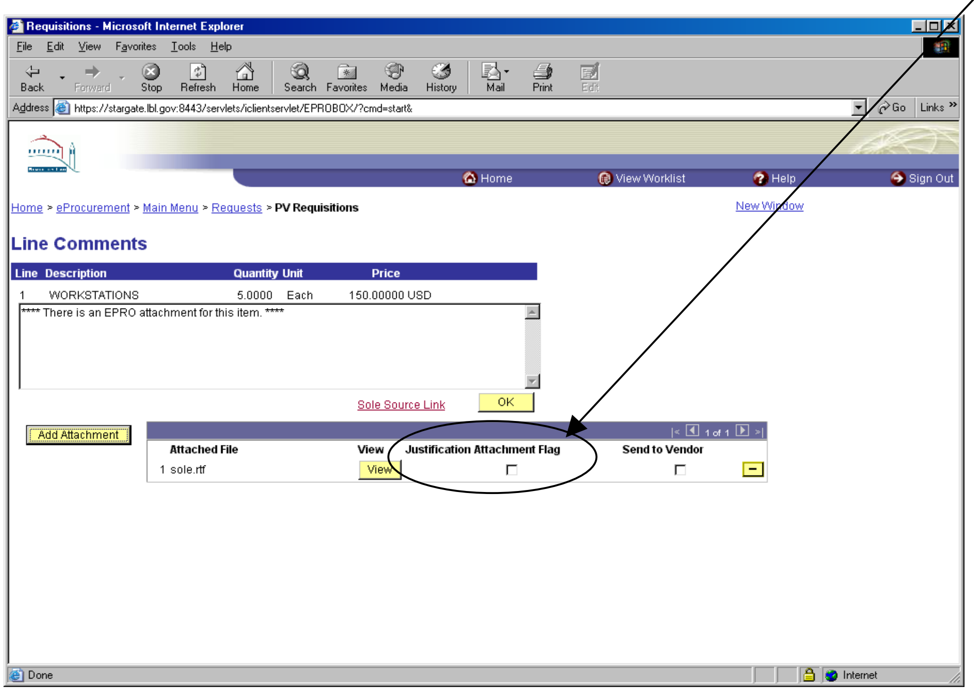


Sole Source Link

Sole Source Form

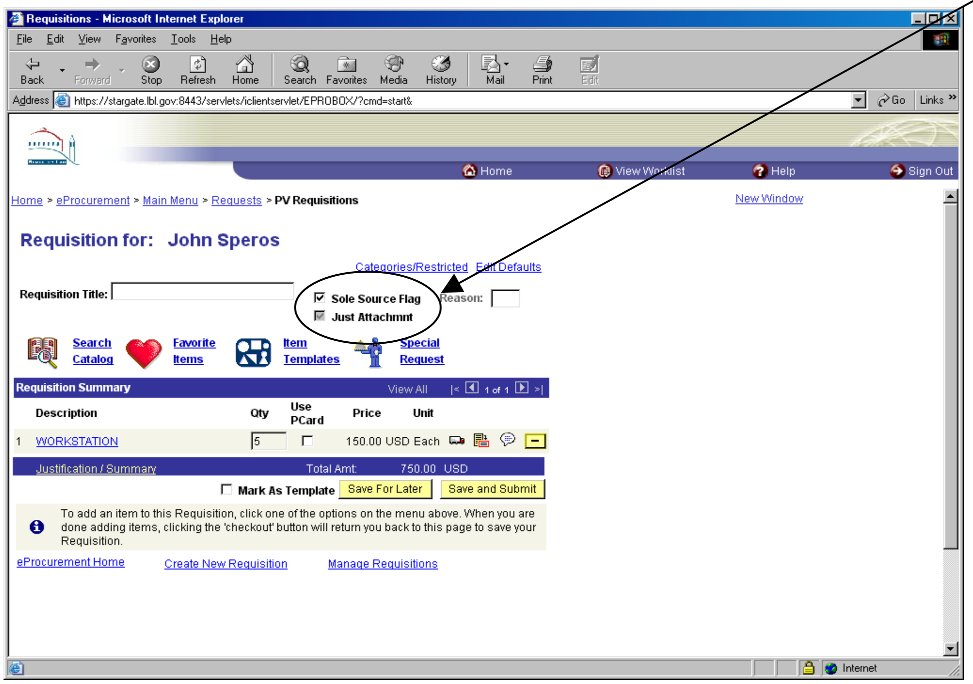


Once the attachment has been loaded the panel will look like this. Check the "Justification Attachment Flag" box before you click OK.



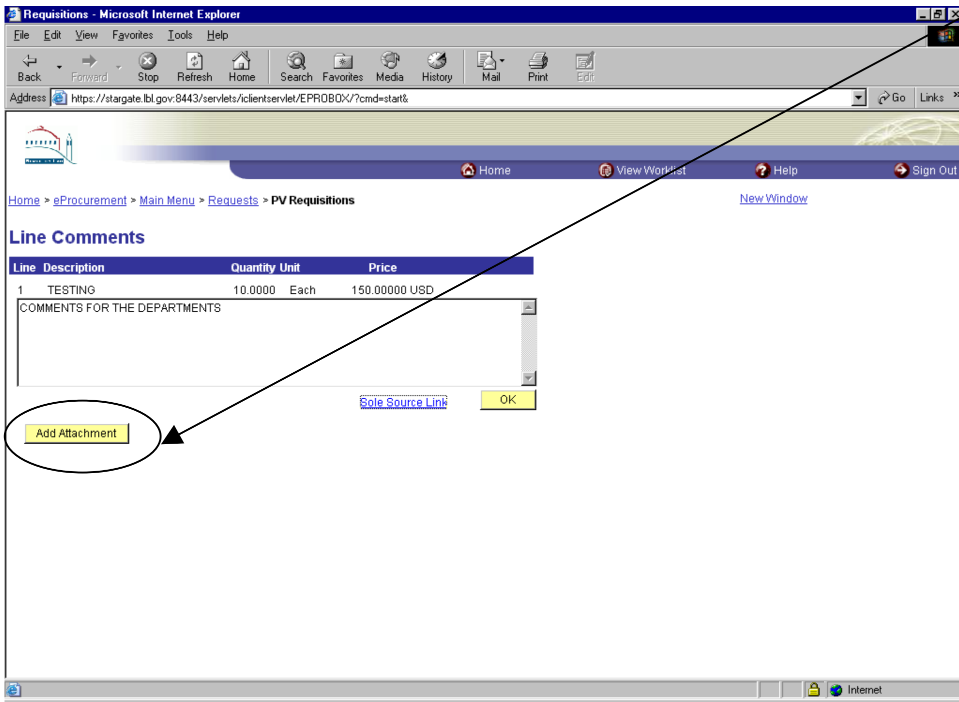
How do I create a Requisition?

Once the file has been attached the "Summary Page" will appear with a check in the "Just Attachment"

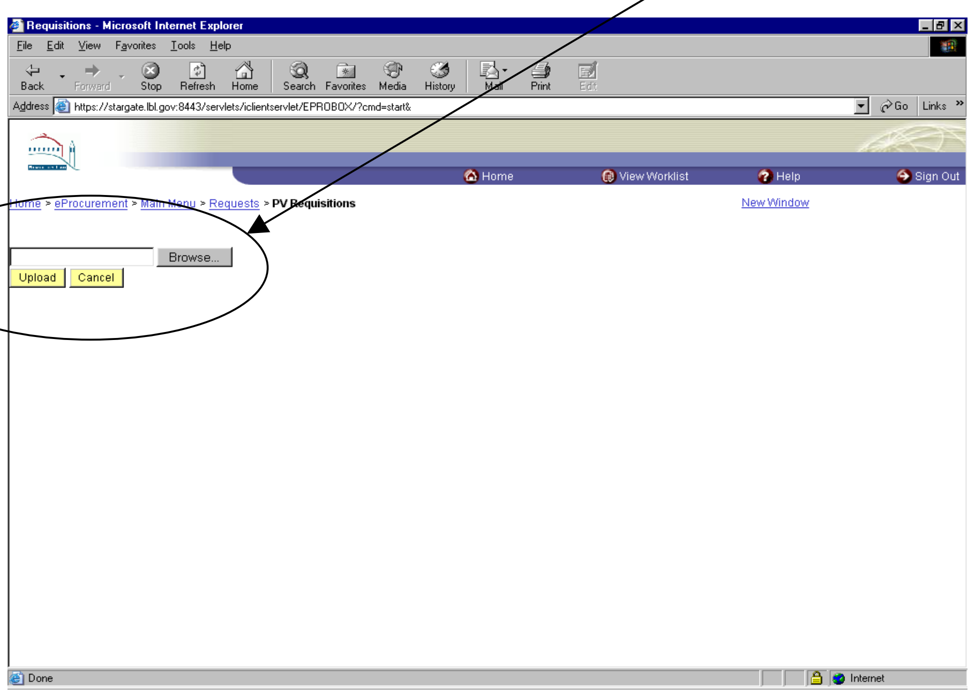


Step 11: Adding File Attachments

- Click on the Add Attachments button and you can browse and attach specific files to your requisition.
    - ***To add additional attachments repeat these steps.***
    - ***All attachments should be added to Line #1 only.***

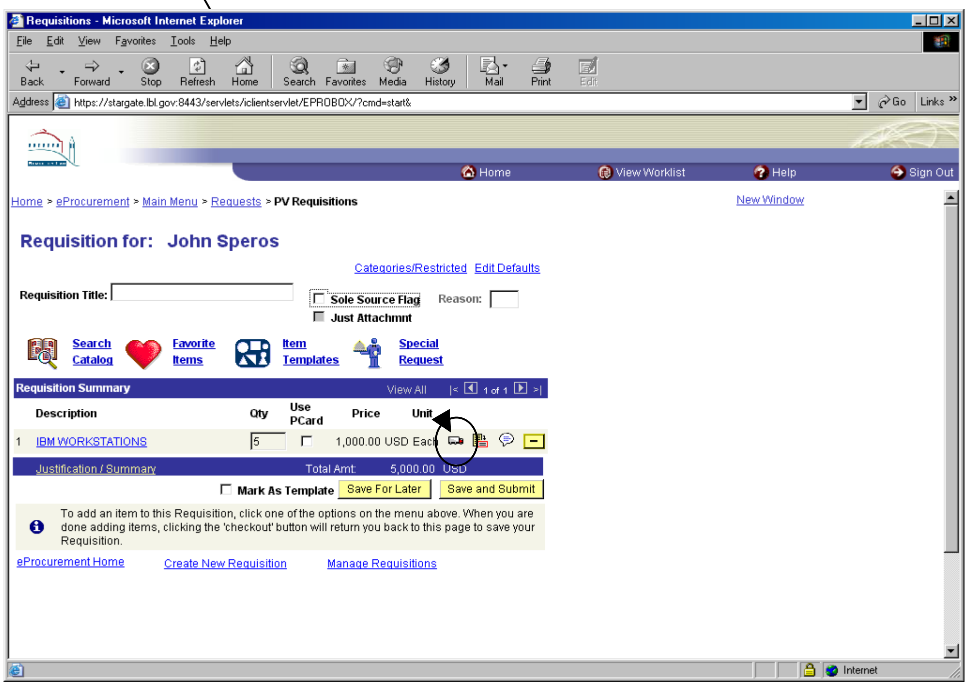


- The browser will allow you to search the database for files

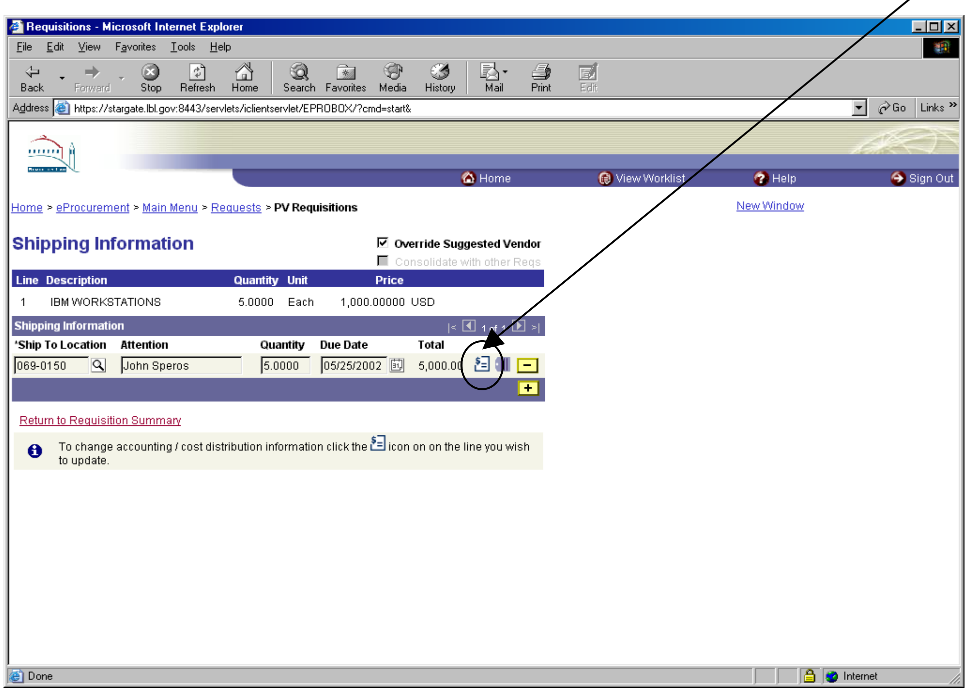


Step 12: Adding multiple line distributions.

With this functionality you will have the ability to add lines to your distribution for several functions including multiple distributions of Project ID's, Cost Distributions, and Delivery Locations. From the Submit panel click on the "**Shipping Info**" icon.

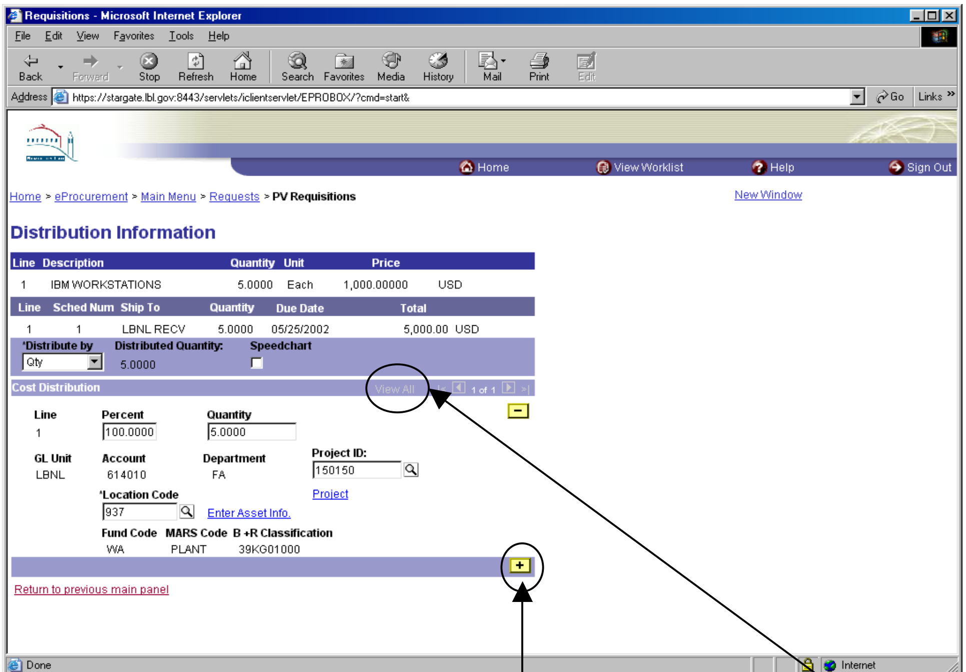


On the Shipping Information panel click on the "**Cost Distribution Information**" icon.

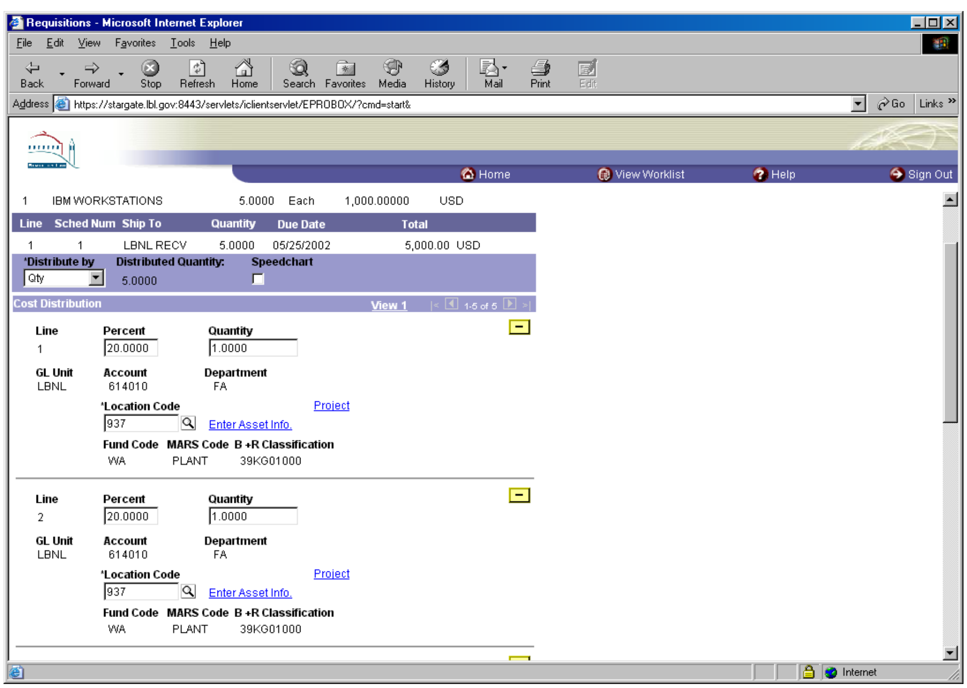


How do I create a Requisition?

On the Distribution Information panel, the Preparer will add additional distribution lines to the requisition.

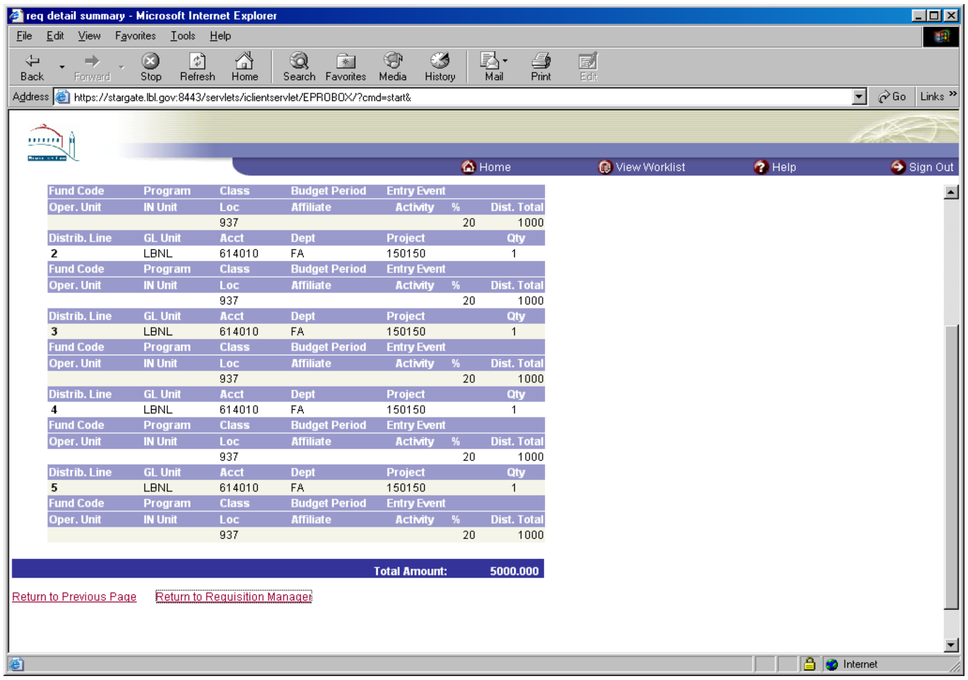


Clicking on the “+” button you can add lines. Clicking on the “View All” button, you will access all the lines and can distribute the items correctly. If you need to change the project ID for the items, you can update that information on this panel as well.



How do I create a Requisition?

When you complete the distribution, return to the main panel and click on “Save and Submit”. If you need to look at your requisition, access Manage Requisitions and open the requisition up for the Line Distribution.



Fund Code	Program	Class	Budget Period	Entry Event		
Oper. Unit	IN Unit	Loc	Affiliate	Activity	%	Dist. Total
		937			20	1000
Distrib. Line	GL Unit	Acct	Dept	Project		Qty
2	LBNL	614010	FA	150150		1
Fund Code	Program	Class	Budget Period	Entry Event		
Oper. Unit	IN Unit	Loc	Affiliate	Activity	%	Dist. Total
		937			20	1000
Distrib. Line	GL Unit	Acct	Dept	Project		Qty
3	LBNL	614010	FA	150150		1
Fund Code	Program	Class	Budget Period	Entry Event		
Oper. Unit	IN Unit	Loc	Affiliate	Activity	%	Dist. Total
		937			20	1000
Distrib. Line	GL Unit	Acct	Dept	Project		Qty
4	LBNL	614010	FA	150150		1
Fund Code	Program	Class	Budget Period	Entry Event		
Oper. Unit	IN Unit	Loc	Affiliate	Activity	%	Dist. Total
		937			20	1000
Distrib. Line	GL Unit	Acct	Dept	Project		Qty
5	LBNL	614010	FA	150150		1
Fund Code	Program	Class	Budget Period	Entry Event		
Oper. Unit	IN Unit	Loc	Affiliate	Activity	%	Dist. Total
		937			20	1000
				Total Amount:		5000.000